

Fall 12-20-2019

The Role of Occupational Therapy for Survivors of Human Trafficking

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DOI: <https://doi.org/10.46409/sr.IIUL8825>

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Mariano, M. (2019). *The Role of Occupational Therapy for Survivors of Human Trafficking*. [Doctoral project, University of St Augustine for Health Sciences]. SOAR @ USA: Student Capstone Projects Collection. <https://doi.org/10.46409/sr.IIUL8825>

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The Role of Occupational Therapy for Survivors of Human Trafficking

by

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A Capstone Presented in Partial Fulfillment

of the Requirement for the Degree of

DOCTOR OF OCCUPATIONAL THERAPY

University of St. Augustine for Health Sciences

December, 2019

THE ROLE OF OCCUPATIONAL THERAPY FOR SURVIVORS OF HUMAN
TRAFFICKING

by

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December 2019

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CHAPTER I: Introduction

Background

Human trafficking involves sex trafficking, labor trafficking, and trafficking of children. This modern-day form of slavery is estimated to affect 35.8 million people in the world (Gorman & Hatkevich, 2016). The needs of survivors of human trafficking are widespread due to the traumatic experiences they face. Concerns that may arise include anxiety, depression, suicidal ideation, memory loss, posttraumatic stress disorder (PTSD), and social isolation. All of which can diminish the confidence that these individuals require for engaging in purposeful occupations, which are meaningful activities in an individual's life (Cerny, 2016). Examples of occupations include self-care activities (eating, sleeping, exercise), productive activities (i.e. work, school, household chores), and social and leisure activities. Substance abuse is another identified problem area for survivors of human trafficking, because substance abuse may be used as a coping method or forced on victims by traffickers (Gorman & Hatkevich, 2016). Survivors of trafficking thus often develop maladaptive coping mechanisms. Psychological effects are widespread due to injury and illness that arise from the abuse inflicted by traffickers and those they are sold to (Harding-Jones, 2019). Exposure to prolonged trauma causing this vast psychological impact is likely to advance if not treated and can be more detrimental than the physical effects (Oram & Domoney, 2018).

Individuals who have been subjected to human trafficking often experience occupational deprivation, indicating that they are unable to partake in personalized, meaningful occupations secondary to previously forced labor (Gorman & Hatkevich, 2016). Occupations that are often developed within the context of a natural environment and involve independent decision-making (such as home maintenance, financial management childcare, and self-care) may be difficult to

perform autonomously while recovering from social injustice (Gorman & Hatkevich, 2016).

Occupational deprivation is evident, further entailing the global need for holistic care for these women, men, boys, girls, and members of the LGBTQ population.

Occupational therapy has yet to establish its role in the recovery process for survivors of human trafficking. Toni Thompson (2017) designed The Community Living Integration Club in order to facilitate employment and safe housing for survivors of sex trafficking. This six-week program resulted in the identification of the need for developing healthy personal relationships outside of those in the program as a key to successful recovery. Feedback from the participants portrayed positive responses regarding individual and group activities, dedicated staff, and future life-skills (Thompson, 2017). After completing the program, participants' suggestions for future program development include having field trips and outings in order to safely explore the community (Thompson, 2017).

Elizabeth Martin (2015) developed occupation-based programs for adolescent survivors of human trafficking in a transitional home. The programs were based on initial occupational therapy evaluation and trauma-informed programming, which found deficits in every area of occupation, and were specifically aimed to provide leisure opportunities. The occupation-based programs (arts and crafts, dance and movement, poetry, and community fieldtrips) successfully promoted leisure, emotional regulation, and executive functioning skills through an arts-based organization for the survivors (Martin, 2015).

Statement of the Problem

Literature currently conveys action being done in relation to prevention and protection for survivors of human trafficking. However, there is limited research that highlight action during recovery for survivors. Occupational therapy can help fulfill the occupational need of community

integration services in order to facilitate normative life roles for survivors (Thompson, 2017).

This capstone project can contribute to exploring the role that occupational therapists can provide through identifying and addressing individualized, occupational needs.

Purpose Statement

A needs assessment will initially be conducted through participant observation, reflective documentation, and semi-structured interviews at a facility that houses individuals who have survived human trafficking in order to identify occupational needs that the participants can utilize for their process of community integration and recovery. An occupation-based program will then be developed and implemented based on the needs assessment and clinical observations.

Rationale for Proposed Project

Occupational therapy is a profession that provides valuable services to help increase engagement in occupations. Trauma may affect occupational participation in various ways. For example, survivors of human trafficking may restrict themselves from interpersonal contact with family and friends, resulting in social isolation (Martin, 2015). One may develop PTSD leading to difficulty with completing self-care activities from overpowering anxiety. Due to past intimidation and coercion, an individual may remain in a restless, distressed state preventing sleep and rest. Trauma-informed care is a treatment framework that involves understanding and responding to the effects of all types of trauma, emphasizing physical, psychological and emotional safety (Bruce et al., 2018). This approach will be a vital aspect to this project, due to its unique focus on environmental factors that contribute to trauma and stress-related disorders (Martin, 2015). Trauma-informed care is essential for holistic healing in order to address individual needs, helping survivors reconstruct their sense of control (Bruce et al., 2018).

The Person-Environment-Occupation Model of Occupational Performance (PEO) is a highly applied model in occupational therapy that has been utilized with past program development for these individuals and will be used for this project. The PEO model sets the concept that there is an ongoing transactional relationship of a person with his or her environment while performing occupations (Law et al., 1996). It highlights the impact of how one's experience in a certain environment can affect their overall occupational performance (Martin, 2015). For survivors of human trafficking, trauma associated with their previous environment will inherently begin to affect who they are as a person, as well as how they perform daily activities. Environments that may impact these individuals include the associated stigma towards the survivors and interactions with law and immigration enforcement. Utilization of the PEO model can benefit these individuals due to its unique perspective to delve into the relationship and meaning among person, environment, and occupation in order to assess presence of occupational deprivation.

Significance of the Proposed Project

The results of the needs assessment will be used to guide and create an occupation-based program, which will be uniquely developed for survivors of trafficking at a specific site for staff and volunteers to be able to implement. This program will serve to empower these individuals through an individualized process of recovery. Providing resources such as opportunities for sustainable employment and vocation-focused education within the stable environment of a safe house could ease the community integration process for this population (Thompson, 2017). Therefore, this capstone project will seek to meet the occupational needs that are expressed by participants in this program which will facilitate autonomy and collaboration through observation, interviews, and discussion.

Preliminary Project Objectives

- Observe current programming at a safe house and assess ability to meet occupational needs
- Conduct interviews with staff members to assess occupational needs of survivors
- Assess presence and potential impact of occupational deprivation through observations and interactions in natural environment
- Synthesize information gathered from needs assessment into recommendations for development of occupation-based program
- Develop and implement program to provide occupational enrichment based upon needs identified in assessment
- Evaluate effectiveness and adjust program as needed

Definitions of Terms

Human trafficking is a complex international phenomenon where human beings are traded through coercion and exploitation (Hodge, 2014). It is a form of slavery in trade for money, including sex trafficking and labor trafficking. *Sex trafficking* is a form of human trafficking, in which an individual is recruited, harbored, transported, or obtained for commercial sex induced by force (“Human trafficking,” 2018). *Labor trafficking* is another form of human trafficking, in which the individual is recruited, harbored, transported or obtained for labor services through force for involuntary servitude (“Human trafficking,” 2018). A *survivor* is an informal, encouraging term utilized by service providers for those who have been trafficked to recognize their strength towards recovery (Thompson, 2017).

A *needs assessment* is a tool that can be used in strategic planning. It is a systematic process for determining needs between current conditions and desired conditions (Hodge, 2014).

Occupational deprivation describes the state at which people are precluded from opportunity to engage in occupations of meaning due to external factors (Martin, 2015). *Community integration* is the process which facilitates active community involvement, such as independence in household activities, community mobility, and vocational functioning (Thompson, 2017). It is designed to help individuals optimize competency to live successfully in the community.

Assumptions, Limitations, and Delimitations

Assumptions of this capstone project include the assumed presence of occupational performance issues among the individuals. Literature has highlighted the presence of occupational deprivation among survivors of human trafficking (Thompson, 2017). However, the presence of occupational deprivation at the selected safe house, Bilateral Safety Corridor Coalition (BSCC), is currently unknown. Another factor to consider is whether or not the individuals are open to occupation-based interventions. Each individual may be in different stages of their recovery process and some may not be ready for intervention, which also makes this a limitation.

Additional limitations include the timeframe of 14 weeks to be able to establish rapport and build enough trust while being able to confidently develop an effective, client-centered program to contribute to their community integration. Another limitation would be the varying access to the occupation-based programming among each individual. They may fluctuate or possibly continue to deny consent. Each individual will also be in different situations of crisis regarding their safety and legality of their case. This may set increased time constraints on their availability and readiness for occupation-based programs. Financial resources of the site and individuals will also have to be considered when planning and implementing activities due to

issues that may arise if limited. Possible issues include supplying required materials for activities or funds for public transportation. Grant writing and fundraising may be implied.

Delimitations that have been analytically indicated include the choice of the site which offers a small group of individuals. The qualitative methods in gathering information, as well as interacting with the individuals was another consideration. Due to the nature of human trafficking and its emergence as a practice area for occupational therapy, it is important to first gather descriptive information from these individuals in order to better understand their experiences before gathering statistical data.

CHAPTER II: Literature Review

Several significant themes will be examined in order to justify the need for this capstone project. The student will analyze the: 1) emerging role of occupational therapy, 2) importance of multidisciplinary collaboration, 3) supplemental application of trauma-informed care.

Emerging Role of Occupational Therapy

The distinct role of occupational therapy for survivors of human trafficking is still emerging. Bryant et al., (2015) submitted a societal statement to the American Occupational Therapy Association (AOTA) to encourage the association to support occupational therapy's role in promoting quality of life and wellness for these individuals. This societal statement highlights occupational therapist's significant role in "promoting participation in meaningful occupations which helps provide a sense of belonging to individuals and assist in the development of their personal identity" (Bryant et al., 2015. p. 18). Several studies suggest occupational therapy's role in recovery through not only occupational performance improvement, but also prevention, education, advocacy, and additional research due to the occupational injustice survivors face (Cerny, 2016; George & Stanley, 2016; Gorman & Hatkevich, 2016). Occupational injustice

occurs when participation in meaningful occupations are impacted by physical, social, and economic factors which are limited for these individuals (George & Stanley, 2016). Smith (2018) describes that meaningful occupations are key to promoting connectivity, relating back to the need for a sense of belonging for these individuals due to the nature of their trauma.

Needs assessments completed by other disciplines have identified needs that occupational therapy can address. Clawson, Small, Go, and Myles (2003) researched a needs assessment on a national scale under the National Institute of Justice and Caliber Associates. Later, Clawson and Dutch (2018) developed a brief under a contract with the U.S. Department of Health and Human Services and Office of the Assistant Secretary for Planning and Evaluation, highlighting common needs and suggested service provision for survivors, after safety needs are sustained. Both studies addressed common needs, including transitional housing, advocacy, life skills, education, financial management assistance, mental health and job training (Clawson & Dutch, 2018; Clawson et al., 2003). Needs of survivors are characterized as “complex, requiring comprehensive services and treatment that span a continuum of care from emergency to short-term to long-term assistance” (Clawson & Dutch, 2018, p. 3).

Review of the literature thus reveals limited occupation-based programs developed by occupational therapists. Findings reveal that individual and group occupation-based interventions, created to improve well-being and provide leisure and psychosocial development, provided positive experiences for survivors of human trafficking (Martin, 2015; Thompson, 2017). Both of the researchers highlight the importance of a needs-based assessment for a specific set of individuals prior to program development in order to ensure client-centered care (Martin, 2015; Thompson, 2017). Suggestions for future research indicate quality control to

improve outcome measurement, need for consistency for the survivors, and providing experiences in the community (Martin, 2015; Thompson, 2017).

Importance of Multidisciplinary Collaboration

Studies have emphasized the importance of collaboration among multiple disciplines when working with survivors in order to provide holistic care. Greenbaum, Yun, & Todres (2018) emphasize that a healthcare professional providing for survivors “is in no position to fulfill all of their needs alone so they must be prepared to work as part of a multidisciplinary team” (p. 161). Needs of survivors are highlighted as multi-faceted and extensive due to the pervasive nature of what they endured, requiring expertise from more than one professional background in order to address their physical, psychological, and social factors (Greenbaum et al., 2018; Harding-Jones, 2019). Harding-Jones (2019) presented two case studies and the strengths and barriers that she came across when providing counseling among a team of varying professions, stating “it was the day-to-day living in a supportive home that ultimately made healing possible” (p. 5). Counseling alone aided in recovery. However, it required multiple disciplines provided by the safe house to be sufficient enough for change (Harding-Jones, 2019). Literature highlights the importance of providing a holistically supportive environment in order to provide the holistic care that survivors require for restoration (Greenbaum et al., 2018; Harding-Jones, 2019).

Supplemental Application of Trauma-Informed Care

Research has indicated the benefits that result from integrating a trauma-informed approach when delivering services and interacting with survivors. Bruce et al. (2018) conducted a cross-sectional study that analyzes perceived competence when practicing trauma-informed care. Findings of the study suggest the need to improve trauma-informed training for providers in

order to better understand and thus address the needs of those who have experienced trauma (Bruce et al., 2018). Literature stresses that trauma is a complex experience that causes short and long-term effects which impairs a person's ability to use healthy cognitive processing (Bruce et al., 2018; Cerny, 2016; Ward-Lasher, Messing, & Stein, 2017). Utilizing trauma-informed care allows for addressing individualized needs by using empathy and collaboration to empower survivors towards community integration, "regardless of how they individually define it" (Schwarz & Britton, 2015, p. 72). Both of the successful occupational therapy program development studies, mentioned above, use a trauma-informed approach (Martin, 2015; Thompson, 2017).

In summary, the role of occupational therapy in the recovery process for survivors of human trafficking is still emerging, while also highly indicated in literature. Needs of survivors call for a survivor-centered, trauma-informed, evidence-based, multidisciplinary, occupation-based approach to support their emotional, social, and physical well-being. The themes discussed will serve as a guide to this capstone project in further distinguishing the role occupational therapists have for survivors of human trafficking.

Chapter III: Project Description

Participants of this project included 12 clients in direct participation with the student and 3 indirectly, through phone calls and e-mail. 14 of the clients were female and 1 was male. Clients were mostly housed by BSCC, others were in transitional or permanent housing but still were able to receive BSCC services and resources.

Timeline included initially meeting staff at the office in order to establish guidelines and clear boundaries before meeting the clients. A script of the student's role was relayed to provide this capstone project's purpose and goal. Needs of the individuals were established through

occupational participation in the community, whether it being at the office, their homes, or a nearby coffee shop. The student completed two interviews with the available case managers on staff within the first week, one with over one year of experience with the clients at BSCC and one with less than 6 months experience (Appendix B). The interviews were held in order to gain insight of the program and what they perceive the survivors are struggling with. Over the course of the first few months of this project, the student conducted an informal needs assessment by gathering information on needs through observation, interaction, and engagement with staff and clients in current programming at BSCC. Primarily focusing on scheduling visits with client, the student met clients individually based on the executive director's suggestions. The student usually met with client at the shelter or in their homes, due to the clients not having their driver's license or owning a vehicle.

Meeting in their natural environment and engaging in activities involving leisure or simple conversation was emphasized in order to establish rapport and trust between the individuals and the student. Harding-Jones (2019) stressed the importance of interaction with survivors in their natural environment, "working outside the traditional therapy boundaries helped deepen my relationships with clients" (p.5). Participants of the study identified the need to spend time with staff members outside of the traditional setting through, "having fun, positive experiences with other residents, taking part in activities, and being able to manage their own finances" (Harding-Jones, 2019, p.4). The student was prepared to focus on building rapport through activity such as cooking, exercising, gardening, and crafts. However, activities that clients agreed to participate in were mostly shopping, social outings, and those involving formal education participation and employment acquisition. An occupation-observation chart created and modified by the student was used to contribute as reflective documentation for this project

(Appendix C). The chart was used to document any observations and statements during the interactions, what happened, and what the perceived needs are based on the visit. Documentation in the chart occurred in BSCC offices without the clients present, immediately after visits in order to control for confidentiality and accuracy. Notes were not taken in the presence of clients in order to decrease formality of this project.

Themes were then gathered based on staff members' interview responses and information from the occupation-observation chart to contribute to program development. During the third month of the project, the student utilized gathered themes to develop a program for the clients that consisted of occupation-based activities. During the fourth month, the proposed project was presented to the staff of BSCC at a case management meeting, at which the staff were then given evaluation questionnaires in order to provide feedback to the student. It was important for the student to gather the community's input as well since they are also working directly with the clients. After evaluations were submitted to the student, the program was adjusted as needed within the last few weeks of the project.

Chapter IV: Results

During a non-standardized, site-based needs assessment of BSCC conducted by the student, there were varied areas identified that could be addressed by occupational therapy. The student utilized observation, discussion, participation, and reflective documentation in current programming with staff and clients to assess potential needs.

Through interview responses, common themes found were stated barriers with BSCC's transition phase for clients, establishing and maintaining social outlets, and addressing clients with behavioral health challenges (see Table 1). One staff member notably stated, "I've noticed

that some clients get very comfortable with a case manager and begin to rely on us too much, they need to learn independence” (Anonymous, personal communication, July 29, 2019).

Through initial introductions, discussion, and participation of everyday occupations with the clients, common themes of perceived needs were independent living skills (i.e., financial management, community mobility, and job acquisition), leisure participation, and addressing language barriers (see Table 1).

Throughout a total of four months of the student’s experience of participating in current programming and general involvement, common themes were collected based on perceived needs of BSCC: need for financial resources, updating screening process due to current common arising situations, and staff training due to high turnover (see Table 2).

Project Proposals

This capstone project focused on the need of highest importance perceived by the student, which was to develop a program that would assist in facilitating independent living skills for the clients. The BSCC Transition Manual was then created and proposed. It consists of occupation-based, trauma-informed, survivor-centered activities designed to promote community integration skills and structure to use during the transition phase of clientele recovery. The overall outcome is for clients to demonstrate readiness for transition into independent living. The manual has four general themes: employment pursuits, community mobility, financial management, and leisure participation, with 1-5 activities under each category (see Table 3).

Activities were broken down based on skills needed to achieve the overall occupation. The student utilized a modified group outline to format activities in order to begin with preparatory, warm-up activities before engaging in the occupation (see Appendix D).

For program sustainability, training the staff was not one of the options due to limitations on staff and their availability to conduct the activities provided within the manual. Availability of the 1-2 case managers were limited due to their focus on emergent needs of the clients with medical and legal issues. BSCC utilized external resources to assist clients with skills the manual facilitated. However, the clients have stated that these external resources were either too far or during the day while they had school or work. The student's goal was to also keep the manual occupation-based and establish a role for occupational therapy for BSCC. Therefore, in order to sustain programming, efforts were made by the student by proposing the following possibilities.

The student proposed a collaboration with either or both University of St. Augustine (USA) fieldwork occupational therapy students and Grossmont Community College occupational therapy assistant students to assist in facilitating transition manual once a week with three students maximum at a time in order to prevent overwhelming clients. The student attempted to set up collaboration among all parties to ensure that a possible memorandum would benefit all parties. The students would have had to be in their mental health rotation and have taken a trauma-informed course. Through virtual meetings and phone calls with the assistance from doctoral coordinators of USA, there were ultimately issues with timing and supervision.

Another proposal made to BSCC was a job description proposal to hire a licensed occupational therapist on staff in order to sustain programming created by the student. A certified occupational therapy assistant (COTA) job description was additionally proposed in attempt to reduce hiring costs by having the COTA position on site more frequently while the OTR would have remote and once a month supervision, in accordance with the California Board of Occupational Therapy regulations (CBOT, 2019). With this proposal, the executive director of BSCC informed the student of her plans in wanting to explore hiring case managers with an

occupational therapy background instead of an occupational therapist due to limitations with financial resources.

Chapter V: Discussion

There were many differences in the projected plan of the student and what happened during the capstone experience. The student prepared for possibilities of group-based interventions and primarily engagement of occupations in leisure. However, clientele of BSCC were mostly at different stages of their recovery in relation to their personal cases, they rarely had group outings, no means of transportation, and most stated that they simply do not have any time for anything besides work and school. Suggestions of an outing to the beach or to a local park were mostly denied by clients due to homework, financial restrictions, transportation restrictions, work, or other obligations. The clients' primary focus was acquiring and sustaining employment and their formal education participation. There were more positive responses from clients when offered to assist with resume building, job applications, school organization, budgeting, and public transportation. The amount of clients that were unable to drive or own a vehicle was not as unexpected. However, what was unexpected was the lack of staff available to drive clients. This lack of transportation affected the clients' ability to engage in occupations with the student outside of their homes.

The student was able to coordinate one outing during this project with all the clients and staff of BSCC in order to increase their sense of community and social participation. However, due to differences in schedules, limited funding, and interests of the clients, it took weeks to plan a location, date, and time where the clients were available and able to attend financially.

Clients with possible psychological and behavioral challenges were also prepared for through research and continuing education unit courses; however, BSCC refers clients of this

nature to other organizations with the appropriate tools to address the challenges. The student did not run into many situations that called for crisis intervention as expected, many of the clients were stable and ready to become independent. Another factor that was expected were possible minors in the program. However, BSCC only shelters those eighteen years and older and refers minors also to other organizations that specialize with services for children and adolescents.

Community partnerships were also key for BSCC due to their reliance on external resources as services for the clients rather than internal programming. BSCC has a large community network within San Diego.

Limitations

Limitations to this project include limited staff and interdisciplinary professions within BSCC. BSCC has various community partnerships and use external resources; however, primarily consists of 1-2 case managers at a time. The limit on staff lead to another limitation regarding program sustainability, which was previously discussed. Additionally, finances of the clients and BSCC were also limited, so planning the activities involved in the transition manual had to surround what resources BSCC has.

Since BSCC primarily involves international clients, some clients did not speak English at which translating digital applications were used as communication. Most clients also either did not have their driver's license nor own a car. Therefore, transportation was planned ahead of time in coordination with the executive director and case managers of BSCC, based on their availability.

Chapter VI: Summary

Conclusions

In regard to the needs of survivors of human trafficking, many areas of need became evident for this project. The manual was created for the clients of BSCC in order to ensure survivor-centered programming. The results of this project support the beneficial role occupational therapy has in addressing the needs for survivors. Not only transitional needs, but also addressing the other occupational needs identified by the student with future occupational therapy capstone projects. It is important to also note that a multidisciplinary approach played a role when assessing needs and creating the manual. Professions that contributed to the program development of this project were those represented at BSCC: case management, outreach, and the executive director. All of whom have had years of experience in combating human trafficking and working directly with the survivors. Everyone at BSCC had input.

For future implications, it is recommended to focus on grant writing a proposal for an occupational therapist position on staff at BSCC and organizations that work with survivors. Additionally, it is recommended that future studies ensure programming to also cater to survivors of international backgrounds, due to possible language barriers and cultural differences. More attention could continue to focus on work and school occupations. However, future programming should further explore readiness for survivors to explore other occupations, such as leisure and social, considering timing and best approach.

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Table 1

Major themes from client interactions and participation

Themes of needs	Examples
Need for facilitating independent living skills	Employment acquisition
	Financial management
	Community mobility
	Education participation
	Time management
	Safety maintenance
	Care of children
Barriers to leisure and social engagement	Self-Care
	Social participation
	Leisure exploration
	Sense of community
	Personal relationships
Need to address their behavioral health	Emotional regulation
	Coping skills
	Stress reduction
	Codependence
Need for language barrier with those from international backgrounds	Formal education participation
	Communication management

Table 2

Major themes from BSCC

Themes of needs	Examples
Needs for financial resources	Fundraising
	Grant writing
Updating screening process	Assessment tool for behavioral health challenges
	Initial orientation/training
Need for staff training	Staff dynamics
	Assisting clients to facilitate independence

Table 3

Manual outline

Occupation	Activity title
Employment pursuits	Career Exploration
	Resume Building
	Communication Etiquette
	Employment Seeking
	Interview Simulations
Community mobility	Public Transportation
	Car Management
Financial management	Budgeting
Leisure participation	Leisure exploration

Appendix A

Student Script

“I am an occupational therapy student from the University of St. Augustine completing a project on the role of occupational therapy when addressing the needs of survivors. Occupational therapy cares about your ability to do daily activities that are meaningful to you. I will be here until the beginning of December, my plan is to get to know you, do activities with you, and learn how I can help support you to do activities.”

Appendix B

Staff Interview Questions

1. What do you feel are the needs of the individuals?
 - a. ADL- self-care activities, basic needs such as dressing, eating, grooming?
 - b. iADL-such as child rearing, financial management, meal prep, community mobility?
 - c. Leisure-outside “fun”?
 - d. Social- community, family friends?
 - e. Work- employment?
 - f. Education- formal education, informal?
2. What else are the individuals struggling with?
3. What are BSCC’s strengths when meeting individual’s needs? Any weaknesses?
4. Of all the areas discussed, what is the most common area of concern for the individuals?
 - a. What is the most important area of concern?

Appendix C

Occupation Observation Chart

Subjective	Objective/Assessment	Plan
<p><i>Example:</i></p> <ul style="list-style-type: none"> - <i>Location/environmental factors</i> - <i>Significant quotes stated</i> 	<p><i>Description of what happened during interaction, activity, visit, etc.</i></p>	<p><i>List of general occupational needs perceived by student based on objective/assessment (i.e., communication management, shopping skills, job acquisition)</i></p>

Appendix D

Bilateral Safety Corridor Coalition (BSCC) Transition Manual

Margaux Mariano, OTDS
University of St. Augustine, San Marcos
Fall 2019

Overview: The BSCC Transition manual is optional for BSCC clients. However, it is recommended to facilitate independent living skills before transitioning into permanent, independent living outside of BSCC.

Vision: “From survivor to thriver”

Mission: To promote community integration skills for clients in transition phase of their recovery.

Outcome: Clients will demonstrate readiness for transition into independent living according to timeframe of 4-6 months given by executive director of BSCC.

Proposal: Transition manual will consist of occupation-based activities designed to promote community integration skills for clients and structure for BSCC to use during clients’ transition phase. Activities are based on a needs assessment conducted at BSCC by former student, which demonstrated need for structure during transition phase of client’s recovery and in areas of community integration skills such as education planning, employment, community mobility, financial management, and leisure exploration to promote holistic participation, well-being, and quality of life for clients transitioning out of BSCC housing.

Definition: Occupation-based activities are used in occupational therapy, where a skill is acquired through practice and training, contributing people to function as part of the community in which they belong, through “life skills training.” Examples include buying groceries for meal planning and preparation or adapting daily routine to promote sleep.

Action Plan:

- Upcoming University of St. Augustine (USA) OTD students
- USA occupational therapy fieldwork students
- Grossmont College occupational therapy assistant fieldwork students
- OT job description proposal
- COTA job description proposal
- Case manager training

Implementation: Manual was developed to be used as a guide to implement activities through an occupational therapy perspective in order to achieve outcomes provided. It contains activities that were developed based on the perceived needs of the clients from July 2019-November 2019.

- *Facilitator(s)* (3 max: 1 client) will plan visits with clients on-site to BSCC offices once-twice a week in order to implement activities within this guide.
- Any page within this guide may be copied/printed for client-use.

Manual Outline

I. Employment Pursuits

Career Exploration

Resume Building

Communication Etiquette

Employment seeking

Interview Simulations

II. Community Mobility

Public Transportation

Car Management

III. Financial Management

Budgeting

IV. Leisure Participation

Leisure Exploration

Guidelines for facilitator(s)

- Each activity contains ‘warm-up’ activities which act as preparatory methods prior to engagement in occupation. Each warm-up/activity may be skipped or modified dependent on client interaction with activity and judgment of facilitators. Multiple warm-ups and activities are outlined due to possible anticipated obstacles, disinterest, or underestimated pace of activities.
- ‘Application’ activity provided within each session will be used as culminating activity in order to ensure realistic application of skills towards occupations with the presence of facilitators. Application activity may also act as a follow-up activity for next planned session to employ carry over of skills and time management. For example, since the Leisure Exploration activities may take a majority of the day; there may not be room for an application activity afterwards within the same session. Therefore, facilitators and clients may schedule Application activity to be done for a follow-up session within 1-2 weeks.
 - Breaks within session may also be given based on facilitators judgment

Activity Descriptions for Clients

I. Employment Pursuits

Career Exploration

Explore career interests and create education plan by comparing colleges and programs based on tuition, location, and admission requirements.

Resume Building

Create professional resume for employment seeking process.

Communication Etiquette

Learn how to generate e-mail messages for future communication in a professional setting.

Employment seeking

Learn how to locate job position(s) that align with livable wage, location, qualifications, and future career goals.

Interview Simulations

Prepare for future in-person job interviews through professional dress, body language, and speech.

II. Community Mobility

Public Transportation

Navigate virtually and in the community through San Diego's public transportation system to become familiar with the process.

Car Management

Learn how to keep up with car maintenance, DMV appointments, and interacting with vehicle services independently.

III. Financial Management

Budgeting

Map out expenses and bills in relation to wage to learn how to manage finances.

IV. Leisure Participation

Leisure Exploration

Engage in exploring recreational activities and creating hobbies to promote wellness.

I. Employment Pursuits

a. *Session Title:* Career Exploration

b. *Supplies*

Computer

Internet

‘Education Plan’ Template

‘Career Exploration Checklist’

Writing utensil

c. *Description*

1. Purpose

The purpose of this activity is to explore career choices and develop executive functioning, communication, and internet navigating skills.

Client goals

- Client will independently navigate through internet in order to map out and compare tuition, location, and possible required prerequisites within 1 week.
- Client will independently identify necessary steps of education plan for him/herself within 2 weeks in order to attain desired future career position.

2. Introduction

This activity will begin with a verbal outline from the facilitators explaining the session’s format.

3. Warm-up

- Facilitators will have clients navigate internet and locate livable wage in desired area of location. Once facilitators have addressed what clients find, refer to livable wage in San Diego: <http://livingwage.mit.edu/counties/06073> and explain how it needs be applied to the job positions they apply for and their future career goals.
- Facilitators will have client fill out ‘Career Exploration Checklist’ for career exploration to address interests, values, and survival (Wage) and initiate discussion regarding possible career choices based on Client’s checklist.

4. Activities

- Clients will research online career options using ‘Career Exploration Checklist’ as a guide. Facilitators may assist if client is unable to initiate career positions to explore. Facilitators will have client choose one career option to further explore. Clients will be then be provided the ‘Education Plan’ template to assist in creating an education plan which should map out the process and steps to attaining their career choice by outlining programs, tuition, and possible future prerequisites. An ‘Education Sample Template’ is provided to also display a sample, however the client may modify to their preference. Important for the client to at least copy the link where they find the information. The ‘College Comparison’ handout will not be used for this activity but may be provided to the client to assist in further career planning. Facilitators may assist once client requests for help by redirecting their internet navigation towards credible websites, how to initially locate a source, or if they are unable to move forward with the activity at any point.

5. Application/Follow-Up

- Plan 1st semester (or next semester) schedule in accordance to personalized education plan

6. Discussion

Facilitators will discuss their educational history with client and inquire about client’s possible educational history in order to promote personal expression of past experience and therapeutic use of self. Open session to any questions the client may have.

7. Summary

Provide external resources and handouts within this session to client. Thank client for participation and address accomplishment.

d. *External Resources*

1. Alabaster Jar Project | Marjorie, Program Coordinator (949) 302-3739

Escondido, Transportation from Escondido Transit Station available

Professional/Career Development (3rd Saturday of every month, all day)

2. Connections 2020 | YMCA

Helps plan employment-internships, volunteer work, etc.

Career Exploration Checklist

Favorite activities: What do you like to do in your free time? (Slots left blank for personal ideas)

<input type="checkbox"/> Computer	<input type="checkbox"/> Arts/crafts
<input type="checkbox"/> Cook/bake	<input type="checkbox"/>
<input type="checkbox"/> Photography	<input type="checkbox"/>
<input type="checkbox"/> Social media	<input type="checkbox"/>

Skills: What are some skills that come naturally?

<input type="checkbox"/> Managing Money	<input type="checkbox"/> Teaching
<input type="checkbox"/> Math	<input type="checkbox"/>
<input type="checkbox"/> Customer service	<input type="checkbox"/>
<input type="checkbox"/> Computer skills	<input type="checkbox"/>

Dream: If you could do any job, what would you choose?

<input type="checkbox"/> Social worker	<input type="checkbox"/> Pharmacy technician
<input type="checkbox"/> Registered nurse	<input type="checkbox"/>
<input type="checkbox"/> School teacher	<input type="checkbox"/>
<input type="checkbox"/> Financial analyst	<input type="checkbox"/>

Lifelong interests: What are some past activities you've been involved in and value? Or would like to be involved in.

<input type="checkbox"/> Community help	<input type="checkbox"/> Pet care
<input type="checkbox"/> Child care	<input type="checkbox"/>
<input type="checkbox"/> Sports	<input type="checkbox"/>
<input type="checkbox"/> Counseling	<input type="checkbox"/>

Thinking about the livable wage which was introduced in the warm-up: What are some ideas and career choices you feel align with San Diego's "livable wage" and your interests/values?

The following are links for further assistance in career exploration:

1. <https://www.bls.gov/k12/content/students/careers/career-exploration.htm>
2. <https://www.careeronestop.org/ExploreCareers/explore-careers.aspx>
3. <https://www.myplan.com/>

Education Plan Sample 1

Career Goal: Financial Manager

Highest education required: Bachelors

Community College: Grossmont Community College

Transfer requirements: <https://admissions.sdsu.edu/transfers/apply>

- Units: Complete 60 or more transferable semester (or 90 or more quarter) units.
- Golden Four: Oral Communication: Complete, with a grade of "C-" or higher, a basic public speaking course or other communication course certified in the area
- Golden Four: Written Communication
Complete, with a grade of "C-" or higher, a freshman composition course that emphasizes essay writing or reading and writing concurrently.
- Golden Four: Critical Thinking
Complete, with a grade of "C-" or higher, a second semester composition or writing course, or a course in reasoning and effective argumentative writing.
- Golden Four: Mathematics
Complete, with a grade of "C-" or higher, a mathematics course above the level of intermediate algebra.
- General Education (GE) Courses: Complete a minimum of 30 units of General Education
- Grade Point Average (GPA): Meet and maintain the grade point average (GPA) required for the major to which the applicant is applying: 2.8

University College for bachelor's degree: San Diego State University, BS in Finance

Graduation requirements: https://advising.sdsu.edu/graduation/nine_graduation_requirements

1. Freshmen Competency Requirements
2. Graduation Writing Assessment Requirement
3. Major and Minor Requirements
4. American Institutions
5. Language Requirement
6. Unit Requirements
7. Residence Requirements
8. Grade Point Average Requirements
9. General Education

Optional concurrent prerequisite fulfillment: N/A

Optional higher education program: N/A

Education Plan Sample 2

Career Goal: Certified Nursing Assistant

Highest education required: High School Diploma or GED

Program requirements: Southwestern College, San Diego, CA-Public

<https://nursejournal.org/certified-nursing-assistant/cna-training-san-diego/>

- Campus: San Diego, CA
- Type: Public
- Tuition: \$46 per unit for in-state students and \$236 per unit for out of state students
- Minimum time commitment: 8.5 units
- Programs: Certified Nursing Assistant Course

Certification requirements:

- Pass CNA exam
- Nursing assistant training
- Criminal background check
- TB check
- Immunizations
- Physical, driver's license
- Social security card
- CPR certification
- Liability insurance

Education Plan

Career Goal:

Highest education required:

Community College/Program:

Requirements:

University College:

Certification/Graduation requirements:

Optional concurrent prerequisite fulfillment:

Optional higher education program:

College Comparison Worksheet			
College Name:			
Location Distance from home			
Size Enrollment, size of campus			
Environment School setting, nearest city Co-ed, male, female Religious affiliation			
Admission Requirements Deadline Tests required, average test scores, GPA. Rank			
Academics Major offered Accreditation Student-faculty ratio Typical class size			
Housing Residence hall requirement, availability, type and sizes Food plan			
Activities Clubs, organizations Greek life Athletics, intramurals Other			
Campus Visits When, special opportunities			
College Expenses Tuition, room & board, estimated total budget, application fee, deposits			
Financial Aid Deadline, forms, scholarship money available % receiving scholarship funding			
Facilities Academic Recreational Other			

I. Employment Pursuits**a. Session Title:** Resume Building**b. Supplies**

Computer

Internet

Resume samples

Writing utensil

Client's personal resume if applicable

'Hard skills vs. Soft skills' Handout

c. Description**1. Purpose**

The purpose of this activity is to develop executive functioning, communication, internet navigation skills, and to develop a resume.

Client goals

- Client will independently create or revise personal resume demonstrating functional skills for desired job position within 2nd session.
- Client will independently be able to modify resume as needed with growth in experience within 2 weeks.

2. Introduction

This activity will begin with a verbal outline from the facilitators explaining the session's format.

3. Warm-up

- Facilitators will initiate discussion with client regarding client's prior experience with resume building and address client's personal resume if applicable. If client already has personal resume, they can use it for this activity. If not, not needed. However, the activity should also guide client when modifying personal resume outside of session. Facilitators will display 'ideal resume sample' and present/discuss in relation to 'Resume dos and don'ts.'

- Facilitators will explain the difference between hard skills and soft skills. Then have client fill out 'Hard skills vs. Soft skills' Handout to help client identify skills to add to resume.

4. Activity

- Facilitators will provide clients with 'Profile Story' and client will fill in 'Experience Profile' based on story. Once client has filled out experience profile handout, facilitators will ask client to locate free resume templates online. If client has tried but is unable to locate free resume template, redirect client to Microsoft Word resume templates to utilize or provide 'Resume Template Sample.' Client will fill out 1-2 sections of resume template based on experience profile. Address that sections of the template may be erased if not provided in the 'Profile Story' or challenge clients to come up with examples of what they would be able to fill in for that section.

5. Application/Follow-up

- Facilitators will have clients build personal resume using resume template of choice. Facilitators may assist once client requests for help with formatting or if unable to move forward with activity at any point.

6. Discussion

Open session to any questions the client may have.

7. Summary

Provide external resources and handouts within this session to client. Thank client for participation and address accomplishment.

d. External Resources

1. Alabaster Jar Project | Marjorie, Program Coordinator (949) 302-3739

Escondido, Transportation from Escondido Transit Station available

Professional/Career Development (3rd Saturday of every month, all day)

2. Connections 2020 | YMCA

Helps plan employment-internships, volunteer work, etc.

3. Microsoft Word Powered by LinkedIn | Resume assistant

Inspiration to help craft resume on Microsoft Word through visible examples

Hard skills vs. Soft skills

Hard skills <i>Teachable abilities or skill sets that are easy to quantify</i>	Soft skills <i>Also known as “people skills” or “interpersonal skills”</i>
<ul style="list-style-type: none"> <input type="checkbox"/> Proficiency in a foreign language <input type="checkbox"/> A degree or certificate <input type="checkbox"/> Typing speed <input type="checkbox"/> Machine operation <input type="checkbox"/> Computer programming <input type="checkbox"/> Apprenticeship <input type="checkbox"/> Software knowledge <input type="checkbox"/> Instruction checking <input type="checkbox"/> Classroom management <input type="checkbox"/> Lesson Planning <input type="checkbox"/> Research skills <input type="checkbox"/> Appropriate resource use <input type="checkbox"/> Budgeting <input type="checkbox"/> Scheduling <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 	<ul style="list-style-type: none"> <input type="checkbox"/> Communication <input type="checkbox"/> Flexibility <input type="checkbox"/> Leadership <input type="checkbox"/> Teamwork <input type="checkbox"/> Time management <input type="checkbox"/> Motivation <input type="checkbox"/> Patience <input type="checkbox"/> Persuasion <input type="checkbox"/> Problem solving <input type="checkbox"/> Work ethic <input type="checkbox"/> Rapport building <input type="checkbox"/> Presence <input type="checkbox"/> Body language <input type="checkbox"/> Self-evaluation <input type="checkbox"/> Desire for professional development <input type="checkbox"/> Negotiation <input type="checkbox"/> Conflict Resolution <input type="checkbox"/> Empathy <input type="checkbox"/> Adaptability

<https://www.thebalancecareers.com/hard-skills-vs-soft-skills-2063780>

Profile Story

Jessica Smith lives at 123 Resume St. National City in California. Her phone number is (619) 123-4567 and e-mail is jsmith@gmail.com. Jessica needs to get a part-time job. Her goal is to become an Applied Behavioral Analyst therapist while attending full-time classes at San Diego State University. Jessica has attended San Diego State University (SDSU) since 2018 and plans to graduate December 2019 with a bachelor's in psychology. She attended Grossmont Community College before SDSU, where she attained her associates in psychology.

Jessica currently works as a hostess at a local Applebee's restaurant since April 2018, where she greets customers, answers phone calls, takes reservations, manages the wait list, provides menus, and shows customers to their seats. Before she was hired at Applebee's, Jessica worked as a self-employed, paid nanny for her family friend from May 2017-April 2018, where her role was to provide a safe environment for the children, transported children to and from school, cleaned after children, cooked for children, and occasionally facilitated craft activities. Jessica has no previous volunteer experience, however, has recently attained her CPR certification. She is fluent in English and Spanish, speaks some Japanese. Jessica claims her strengths are her time management, critical thinking, and problem solving.

Experience Profile

Full name:

Address:

Phone number:

E-mail:

Objective:

Education:

Professional Experience:

Unpaid/Volunteer work:

Language:

Additional skills:

Certifications:

Resume Template Sample

FIRST NAME

Last Name

ADDRESS | PHONE | EMAIL

Skills Summary

Education

Degree / Date of Graduation

Experience

Name of Employer

Job Title / Dates of Employment

Awards and Acknowledgements

Type of Award / Award Description

Resumes Dos and Don'ts

Do highlight your most relevant experiences	Don't freak out if you have no relevant experience
Do optimize for applicant tracking systems	Don't steal the job description's exact wording
Do use data	Don't include anything confidential
Do include soft skills, too!	Don't include obvious skills
Do consider volunteer or other non-work experience	Don't include work with controversial organizations
Do include personal accomplishments	Don't include random, unrelated, or off-putting hobbies
Do think of new ways to frame your accomplishments	Don't go overboard
Do show how you moved up (or around) at past companies	Don't try to hide gaps
Do consider a summary statement	Don't include "References Upon Request"
Do tell the truth	Don't include anything that could be discriminated against
Do keep it to one page	Don't use more than 2 fonts
Do make sure your job titles or companies stand out	Don't go overboard with text effects
Do align your dates and locations to the right	Don't use more than two lines per bullet
Don't send it as a word document	

<https://www.themuse.com/advice/42-resume-dos-and-donts-every-job-seeker-should-know>

Ideal Resume Sample

Brenda Dayton

HUMAN RESOURCES MANAGER

111-222-3333 | bdayton221@yahoo.com | Indria, DE

SKILLS

- Excellent communication skills and fluency in English, Spanish, and French
- Over 7 years of experience in the human resources field
- Knowledge of various state legislation regarding insurance, taxes, and hiring procedures

WORK EXPERIENCE

HUMAN RESOURCES MANAGER, ERICKSON FINANCIAL, 2011 - PRESENT

- Oversaw a team of twelve
- Reviewed resumes and application materials
- Made recommendations to hiring manager
- Performed monthly quality assurance assessments.

HUMAN RESOURCES SPECIALIST, JOHN FINANCIAL, 2007 - 2011

- Reviewed resume and application materials
- Conducted training sessions
- Organized orientation schedule and made preparations for seminars.

HUMAN RESOURCES SPECIALIST, DALLAS FINANCIAL, 2006 - 2007

- Obtained certifications for all employees
- Worked with budgeting department
- Ensured that financial forms were completed accurately.
- Oversaw training process for new hires

EDUCATION

SAMSON COLLEGE | AUGUST 2000 - MAY 2004

Bachelors of Arts, Art History

PHOENIX BUSINESS SCHOOL | AUGUST 2004 - MAY 2008

Masters of Business Administration, Human Resources

I. Employment Pursuits

a. *Session Title:* Communication etiquette

b. *Supplies*

Writing utensil

E-mail samples

‘15 E-mail Etiquette Rules’ Handout

c. *Description*

1. Purpose

The purpose of this activity is to develop executive functioning and communication skills.

Client goals

- Client will be able to produce professionally appropriate e-mail in response to hiring managers and employers within 1 week.
- Client will be able to initiate and respond professionally when contacted via phone within 1 week.

2. Introduction

This activity will begin with a verbal outline from the facilitators explaining the session’s format.

3. Warm-up

- Facilitators will inquire client about e-mail address used for professional networking. If client has unprofessional address such as “cutepartygirl@yahoo.com” or does not give key information to recognize client, direct client into creating new e-mail address. Explain to client that an e-mail address plays a key role in expressing professionalism. It should not give a wrong impression and should give key information for recognition, usually one’s name.
- Facilitators will provide client with ‘15 E-mail Etiquette Rules’ handout provided within this session and discuss. Facilitators will then display “unprofessional” e-mail sample (Sample #1) and read it out loud with client then revise in order to increase professionalism with client. Facilitators should

emphasize that how we articulate ourselves through e-mail is important to hiring managers and in any professional setting.

4. Activity

- Facilitators will pass out two e-mail samples (Sample #2 & #3) and have them decide which one is considered more professional than the other. Once the client has chosen the correct e-mail as professional, the facilitators will have them edit and revise the less professional e-mail using the writing utensil provided on his/her own. The facilitators will simultaneously edit/revise the e-mail and once both parties have completed revisions. Facilitators will then verbally compare revisions made in order for clients to be able to see how they could have improved the e-mail differently. Challenge the client to also initially explain why they made the revisions.

5. Application/Follow-up

- Client will locate cover letter template online and generate a cover letter to a potential hiring manager using an e-mail format. Client has the option to save generated cover letter and send out to hiring manager with personal resume.

6. Discussion

Facilitators will discuss experiences they may have had in relation with communication etiquette and the importance in a professional setting. Open session to any questions the client may have.

- Sample questions for discussion
 - When would you e-mail hiring managers instead of calling them via phone?
 - What are some general guidelines for a professional e-mail address/e-mail content?

7. Summary

Provide external resources and handouts within this session to client. Thank client for participation and address accomplishment.

d. *External Resources*

1. Alabaster Jar Project | Marjorie, Program Coordinator (949) 302-3739

Escondido, Transportation from Escondido Transit Station available

Professional/Career Development (3rd Saturday of every month, all day)

2. Connections 2020 | YMCA

Helps plan employment-internships, volunteer work, etc.

E-mail Sample #1

To: Bob Pope
From: Gabrielle Mendes
Subject: Job?

Hey Bob, We talked a couple weeks back at the chamber of commerce event. (I was the one looking for a summer internship and had a zit on my lip that could have passed for a cold soar. Lol. Whew. It was not. You're probably like, "uh.. What?" Maybe that helps you recall, maybe not. Not completely important, I suppose.

I'd really like to come work for you at your IT business. You seemed like a cool person to work for, I liked ur striped pants. I'm available to start working on Monday, but I am taking my driver's test in June and have to study and go an hour and half away to take it at an easier place cause I'm not a great driver so I'll miss a few days. I am also going to the beach with friends for a week in July. Oh, and my grandmother has bad gas (OMG IT'S TERRIBLE) and sometimes I have to take her to the doctor.

I've attached my resume, it's the bomb dot com. Let me know if you have a job opening for me. I can't wait to play on some computers. If I don't respond to your email, I'm always on FB, snapchat or insta!

Peace out,

Gabrielle Mendes

E-mail Sample #2

From: Tricia Marcus
To: Allison Brown
Subject: Today's Meeting
Hey Allison!

I am looking forward to seeing you today for our meeting. I've attached the materials needed for our discussion. Let me know if you have any questions.

Regards,

Tricia Marcus

Marketer Extraordinaire

hotpartychick@triciamarketing.com

(555) 545-5656

E-mail Sample #3

To: Employer
From: Ty Stringer
Subject: I need jobz

der Employer,

I wud like 2 apply 4 da job in customer service. I saw ur job on FB. I got my resume and added it to da email. I wud appreci8 ur response. -TS

15 E-mail Etiquette Rules

1. Include a clear, direct subject line.

Examples of a good subject line include "Employment inquiry" "Interview follow-up" or "Questions for Sales Associate Position."

2. Use a professional email address.

You should always have an email address that conveys your name so that the recipient knows exactly who is sending the email. Never use email addresses (perhaps remnants of your grade-school days) that are not appropriate for use in the workplace, such as "babygirl@..." or "beerlover@..."

3. Think twice before hitting 'reply all.'

No one wants to read emails from 20 people that have nothing to do with them. Ignoring the emails can be difficult, with many people getting notifications of new messages on their smartphones or distracting pop-up messages on their computer screens. Refrain from hitting "reply all" unless you really think everyone on the list needs to receive the email.

4. Include a signature block.

Provide your reader with some information about you. "Generally, this would state your full name, title, the company name, and your contact information, including a phone number. You also can add a little publicity for yourself, but don't go overboard with any sayings or artwork." Use the same font, type size, and color as the rest of the email, she says.

5. Use professional salutations.

Don't use laid-back, colloquial expressions like, "Hey you guys," "Yo," or "Hi folks."

6. Use exclamation points sparingly.

If you choose to use an exclamation point, use only one to convey excitement.

7. Be cautious with humor.

Humor can easily get lost in translation without the right tone or facial expressions. In a professional exchange, it's better to leave humor out of emails unless you know the recipient well. Also, something that you think is funny might not be funny to someone else.

8. Know that people from different cultures speak and write differently.

Miscommunication can easily occur because of cultural differences, especially in the writing form when we can't see one another's body language. Tailor your message to the receiver's cultural background or how well you know them.

9. Reply to your emails--even if the email wasn't intended for you.

It's difficult to reply to every email message ever sent to you, but you should try to. This includes when the email was accidentally sent to you, especially if the sender is expecting a reply. A reply isn't necessary but serves as good email etiquette, especially if this person works in the same company or industry as you.

10. Proofread every message.

Your mistakes won't go unnoticed by the recipients of your email. "And, depending upon the recipient, you may be judged for making them.

11. Add the email address last.

Even when you are replying to a message, it's a good precaution to delete the recipient's address and insert it only when you are sure the message is ready to be sent.

12. Double-check that you've selected the correct recipient.

Pay careful attention when typing a name from your address book on the email's "To" line. It's easy to select the wrong name, which can be embarrassing to you and to the person who receives the email by mistake.

13. Keep your fonts classic.

The cardinal rule: Your emails should be easy for other people to read.

14. Keep tabs on your tone.

Just as jokes get lost in translation, tone is easy to misconstrue without the context you'd get from vocal cues and facial expressions. Accordingly, it's easy to come off as more abrupt than you might have intended --you meant "straightforward," they read "angry and curt."

15. Nothing is confidential--so write accordingly.

Every electronic message leaves a trail.

<https://www.inc.com/business-insider/email-etiquette-rules.html>

I. Employment Pursuits

a. *Session Title:* Employment Seeking

b. *Supplies*

Computer

Internet access

Paper

Writing utensil

c. *Description*

1. Purpose

The purpose of this activity is to develop executive functioning, communication, and internet navigation skills.

Client goals

- Client will be able to independently locate appropriate job position(s) that personally align within livable wage, location, qualifications, and future career goals.

2. Introduction

This activity will begin with a verbal outline from the facilitators explaining the session's format.

3. Warm-Up

- Facilitators will initiate discussion with client regarding possible job positions. Facilitators will have clients navigate internet and locate livable wage in desired area of location. Once facilitators have addressed what clients find, refer to livable wage in San Diego: <http://livingwage.mit.edu/counties/06073> and explain how it needs be applied to the job positions they apply for and their future career goals.

4. Activity

Facilitators will provide client with supplies and ask clients to locate job search engines on computer. Facilitators will have clients list appropriate jobs that align with livable wage, location, qualifications, and future career goals. Facilitators may assist once client requests for help with initiation of where/what to search or if unable to move forward with activity at any point.

5. Application/Follow-Up

- Clients will apply to appropriate jobs that align with livable wage, location, qualifications, and future career goals.

6. Discussion

Facilitators will discuss previous part-time jobs before/while attending college to promote personable perspective for client. Open session to any questions the client may have.

7. Summary

Provide external resources and handouts within this session to client. Thank client for participation and address accomplishment.

d. External Resources

1. Alabaster Jar Project | Marjorie, Program Coordinator (949) 302-3739

Escondido, Transportation from Escondido Transit Station available

Professional/Career Development (3rd Saturday of every month, all day)

2. Connections 2020 | YMCA

Helps plan employment-internships, volunteer work, etc.

I. Employment Pursuits

a. *Session Title:* Interview Simulations

b. *Supplies*

‘Interview Checklist’ handout x2

Writing Utensil

Computer

Internet access

c. *Description*

1. Purpose

The purpose of this activity is to develop executive functioning and communication skills.

Client goals

- Client will be able to independently dress him/herself appropriately in preparation for professional interview within 1 week.
- Client will be able to independently answer 2-3 potential job interview questions within 1 week.

2. Introduction

This activity will begin with a verbal outline from the facilitators explaining the session’s format.

3. Warm-up

- Facilitators will initiate session by displaying website:
<https://www.virtualoutfits.com/> or <https://www.trendme.net/dress-room/make-your-fashion-combination/> which are platforms for designing outfits online for free. Facilitators will have client follow instructions and first have client locate and select appropriate clothing items when going to a job interview. Facilitators will then trial 3-5 outfits of their choosing (Simulating unprofessional and professional looks) and the client will have to decide whether or not the outfit is appropriate and explain why or why not.

4. Activity

Two of the facilitators will simulate interview sessions acting as the potential employees/candidates and the client will act as hiring manager. The goal is for the

client to understand how aspects of an interview look to hiring managers. One facilitator will act as the unprofessional candidate by nonchalantly apologizing for arriving late, not maintaining eye contact, poor body language, not shaking hand, sidetracking conversation, etc. The other facilitator will act as the professional candidate making sure they meet relay and emphasize professionalism through body language, communication, and eye contact.

A third facilitator will sit next to the client who is acting as the hiring manager in case, he/she requests assistance with interview questions or deciding who to hire. This facilitator will assist in initiation of job interview simulation by setting up a tabletop surface in between two chairs for the client and the acting candidates. Client will be provided the 'Interview Checklist' to guide his/her interview questions and processing. Acting candidates will take turns to be individually interviewed by the client emphasizing their professionalism/unprofessionalism. The facilitator who is assisting the client will then discuss and collaborate with client on who he/she would hire, and why or why not.

5. Application/Follow-up

- Facilitators and client will switch positions as assigned in previous activity. Client will act as interviewee and will be interviewed by 1 facilitator to simulate interview process for client and practice answering questions while demonstrating good body language, communication, and eye contact.

6. Discussion

Facilitators will discuss the importance of body language, communication, and eye contact and provide handout on 'Job Interview Body Language' to discuss. Open session to any questions the client may have.

7. Summary

Provide external resources and handouts within this session to client. Thank client for participation and address accomplishment.

d. *External Resources*

1. Alabaster Jar Project | Marjorie, Program Coordinator (949) 302-3739

Escondido, Transportation from Escondido Transit Station available

Professional/Career Development (3rd Saturday of every month, all day)

2. Alabaster Jar Project | (858) 598-3238, By appointment only
Escondido, Transportation from Escondido Transit Station available
Clothes Closet to select clothing, makeup, jewelry, shoes, etc.

3. Connections 2020 | YMCA
Helps plan employment-internships, volunteer work, etc.

Interview Checklist

Questions:

- ☐ Tell me about yourself.
- ☐ What interests you about this job opening?
- ☐ What do you know about our company?
- ☐ Why are you leaving your current job?
- ☐ What are your strengths?
- ☐ What are your weaknesses?
- ☐ Where do you see yourself in five years?
- ☐ Do you have any questions for me?

Checkoffs:

- ☐ Arrived on time
- ☐ Professionally dressed
- ☐ Shook hands firmly before/after
- ☐ Maintained eye contact
- ☐ Professional body language
- ☐ Prepared for questions
- ☐ Organized in communication
- ☐ Shows confidence
- ☐ Appeared friendly

Job Interview Body Language

Don't:

- Rub the back of your head or neck. Even if you really do just have a cramp in your neck, these gestures make you look disinterested.
- Rub or touch your nose. This suggests that you're not being completely honest, and it's gross.
- Sit with your arms folded across your chest. You'll appear unfriendly and disengaged.
- Cross your legs and idly shake one over the other. It's distracting and shows how uncomfortable you are.
- Lean your body towards the door. You'll appear ready to make a mad dash for the door.
- Slouch back in your seat. This will make you appear disinterested and unprepared.
- Stare back blankly. This is a look people naturally adopt when they are trying to distance themselves.

Do:

- Sit up straight and lean slightly forward in your chair. In addition to projecting interest and engagement in the interaction, aligning your body's position to that of the interviewer's shows admiration and agreement.
- Show your enthusiasm by keeping an interested expression. Nod and make positive gestures in moderation to avoid looking like a bobblehead.
- Establish a comfortable amount of personal space between you and the interviewer. Invading personal space (anything more than 20 inches) could make the interviewer feel uncomfortable and take the focus away from your conversation.
- Limit your application of colognes and perfumes. Invading aromas can arouse allergies. Being the candidate that gave the interviewer a headache isn't going to do anything in your favor.
- If you have more than one person interviewing you at once, make sure you briefly address both people with your gaze (without looking like a tennis spectator) and return your attention to the person who has asked you a question.
- Interruptions can happen. If they do, refrain from staring at your interviewer while they address their immediate business and motion your willingness to leave if they need privacy.
- Stand up and smile even if you are on a phone interview. Standing increases your level of alertness and allows you to become more engaged in the conversation.

Say Goodbye Gracefully

After a few well-thought-out questions and answers with your interviewer, it's almost over, but don't lose your cool just yet. Make sure your goodbye handshake is just as confident now as it was going in. Keep that going while you walk through the office building, into the elevator and onto the street. Once safely in your car, a cab or some other measurable safe distance from the scene of your interview, it's safe to let go. You may have aced it, but the last thing you want is some elaborate end-zone dance type of routine killing all your hard work at the last moment.

<https://www.careerbuilder.com/advice/body-language-dos-and-donts-in-the-interview>

II. Community Mobility

a. *Session Title:* Public Transportation

b. *Supplies*

Computer

Internet access

c. *Description*

1. Purpose

The purpose of this activity is to develop executive functioning, communication, and community mobility skills.

Client goals

- Client will independently locate closest nearby station for city bus or trolley to personal home location within 1 week.
- Client will independently plan out course to transport from point A to point B with public transportation system such as San Diego Mass Transit within 1 week.

2. Introduction

This activity will begin with a verbal outline from the facilitators explaining the session's format.

3. Warm-up

- Facilitators will display YouTube videos regarding San Diego public transportation for clients:
 - <https://www.youtube.com/watch?v=3Oh93tjXhyg>
 - <https://www.youtube.com/watch?v=XTiHSppA18>
 - https://www.youtube.com/watch?v=CtGG2idO_9c
 - Optional VLOG of Bus and Trolley
 - <https://www.youtube.com/watch?v=F9OSJa0wQZ8&t=210>

4. Activity

Facilitators will have client explore <https://www.sdmts.com/>. Facilitators will then ask clients to try to map out trip from personal home to BSCC office using website. If client is unable to map out course of trip, request assistance, or unable to move forward with activity, facilitators may guide client to 'Trip Planner' on

website, where Point A and Point B may be entered. Once addresses are typed into “From” and “To”, times and dates are inserted, and type of transportation is selected, click “Plan Trip” and a route plan with times and locations should be mapped out for client. Sample provided on next page. Client is also able to send directions directly to their personal phone if needed by clicking the icon pictured below:



5. Application/Follow-up

- Client will develop personal trip for client and facilitators to participate in local community to nearby grocery store or library. Client will guide facilitators by using their plan as a guide. Facilitators may assist once client is unable to move forward with activity.

6. Discussion

Facilitators will discuss the importance of safety when utilizing public transportation and go over ‘Public Transportation Tips’. Open session to any questions the client may have.

Sample Questions for discussion:

- How did you feel after using public transportation?
- What was easy about using public transportation? What was difficult?

7. Summary

Provide external resources and handouts within this session to client. Thank client for participation and address accomplishment.

d. *External Resources*

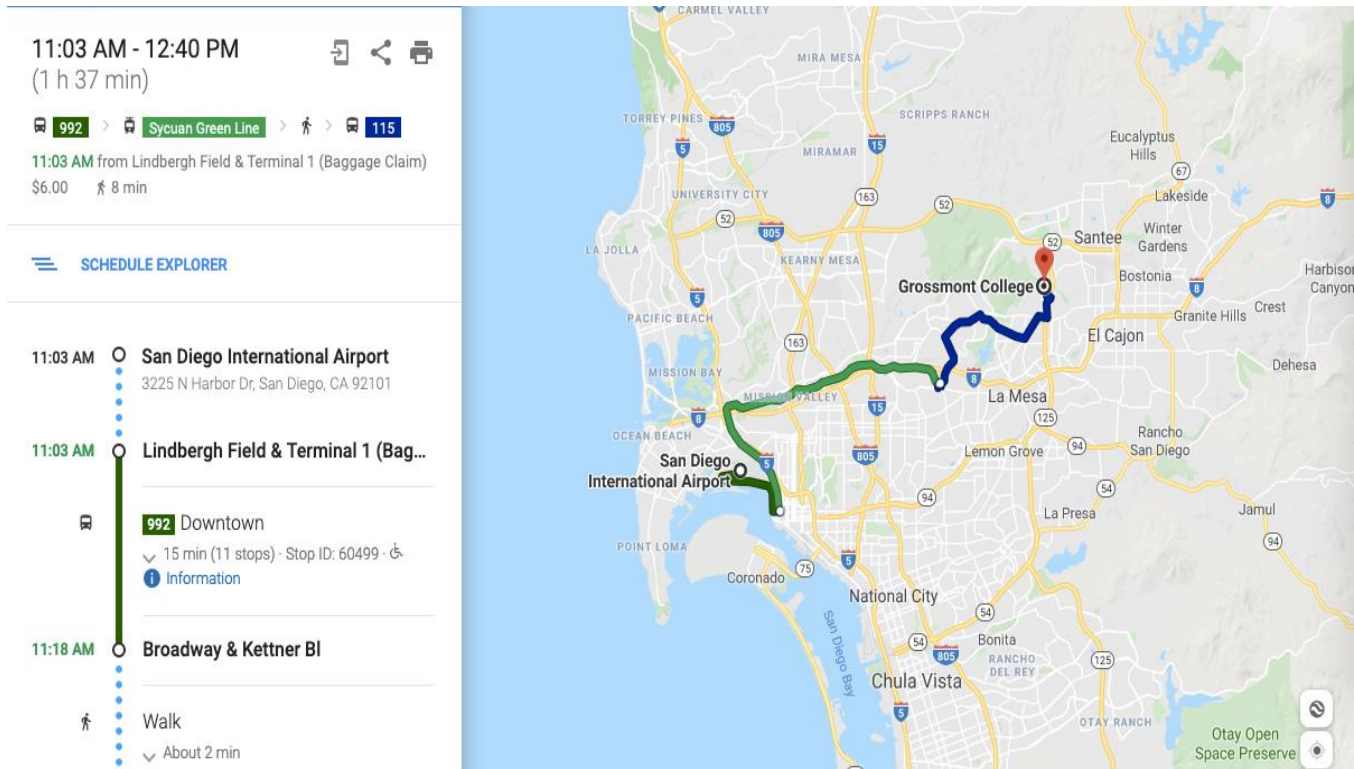
1. Adult Literacy Services| National City Public Library, (619) 470-5860

1401 National City Blvd, Call to schedule

One-on-one tutoring/small group study for public transportation preparation

(Monday-Thursday 10AM-6PM)

Trip Sample



Public Transportation Tips

Be aware of your surroundings

- Watch out for people who take more than a passing interest in you or your belongings
- Look both ways before crossing the tracks or the street
- Don't let your headphones keep you from hearing horns, sirens or important announcements
- Trains and Trolleys always have the right of way on the tracks, so look both ways and wait for it to pass before crossing

Keep your valuables secure

- Hold onto any purses, backpacks or bags to avoid theft
- Keep small and valuable items securely hidden when possible
- Be aware cell phones and handheld electronics are popular theft items

Be polite

- Allow passengers to exit the bus or Trolley before you board
- Reserve the designated seats at the front for senior or disabled passengers
- Don't put your feet on any seating surface
- Keep yourself and your belongings in one seat

<https://www.sdmts.com/rider-info-safety-security/safety-tips>

II. Community Mobility

a. *Session Title:* Car management

b. *Supplies*

Internet access

Laptop/Computer

c. *Description*

1. Purpose

The purpose of this activity is to develop executive functioning, communication, and community mobility skills.

Client goals

- Client will independently navigate through internet in order to locate required services needed within 1 week.
- Client will independently schedule personal car maintenance appointments within 2 weeks.

2. Introduction

This activity will begin with a verbal outline from the facilitators explaining the session's format.

3. Warm-up

- Facilitators will have clients use laptop/computer or personal device to locate a free digital application that assists with car management (i.e., DMV appointments, maintenance, etc.)
 - Examples are included under external resources if client is unable to locate
- Facilitators will read through “Vehicle ownership 101: What everyone should know” and “Car-care basics for first-time owners” handouts with client and answer any questions client may have

4. Activity

Facilitators will have client locate California DMV official website and explore once found. Facilitators will ask clients to also locate their nearest automobile repair shop, dealership, and/or car service.

5. Application/Follow-up

- Client will schedule next maintenance/necessary DMV appointment with presence of facilitators to ensure “new-car owner friendly” prices/services

6. Discussion

Open session to any questions the client may have.

7. Summary

Provide external resources and handouts within this session to client. Thank client for participation and address accomplishment.

d. *External Resources*

1. San Diego Youth Services | STARS | Denise Thompson, (619) 521-2250

Fee waivers for driver’s license process, behind-the-wheel, written test resources

**Youth up to 21 years of age only*

2. Adult Literacy Services| National City Public Library, (619) 470-5860

1401 National City Blvd, Call to schedule

One-on-one tutoring/small group study for Driver’s license test preparation

(Monday-Thursday 10AM-6PM)

3. Drivvo | Free Digital application

Finance manager for vehicle: control supplies, maintenance, and expenses

4. Car management: Car maintenance, vehicle manager| Free Digital application

Manage deadlines of cars, such as insurance, MOT and maintenance such as inspection, MOT, oil changes, filter changes and much more

Vehicle Ownership 101: What Everyone Should Know

Owning a car is both a privilege and an investment. The most important thing besides being a safe driver is to understand the fundamentals of vehicle mechanics. This knowledge will help protect your investment in the long run while circumventing potential maintenance issues that could turn into costly repairs.

Car Engine Oil

An oil change is the most common type of routine maintenance and also the most vital to keeping your vehicle running smoothly. Though every new car basically comes equipped with electronic monitoring to notify the driver when it's time for an oil change by displaying a light or message on the dash, it's always good to know upfront how many miles it can go in between service and which type of oil is recommended by the manufacturer. There is a big cost difference between conventional and full synthetic oil. The latter being almost exclusively used in hybrid and luxury vehicles. The old belief of needing an oil change every 3,000 miles has been proven unnecessary, rather 5,000-10,000 is the new average. Check your vehicle owners' manual to find your make and model specific requirements.

Spare Tire

Almost all cars have a dedicated space to store a spare tire which you might need in an emergency situation. However, in an effort to cut costs, a new trend has been to replace a spare tire with sealant and inflator kits to save weight and fuel. However, if your vehicle does have one, it's generally kept in the trunk. Though it might be an intimidating task, everyone should learn how to change a spare tire. It can certainly be challenging especially on larger vehicles, and may not be able to be done alone, but putting the effort in and doing a few test runs by changing a spare tire before an emergency occurs, can save you time on the side of the road in a bad neighborhood, with screaming children or in bad weather—until help arrives.

Changing Filters

Vehicles have several different filters all of which need to be changed relatively frequently. Filters are generally changed with each oil change or every other. Cabin air filters generally need to be replaced every 15,000 to 25,000 miles or about once a year. Fuel-air filters generally last for 2 years so get changed about every 30,000 miles. Oil filters are generally changed every oil change or about 1-2 times a year. Lastly, your engine air filter should be changed every 15,000 to 45,000 miles. It has a large variance mainly due to driving conditions because its purpose is to protect your car from dust, dirt and environmental contaminants. So if you do a lot of city driving or live in desert areas of the southwest you can expect to change your engine air filter more frequently.

Headlights and Taillights

Headlights allow drivers to see at night and in conditions with low visibility; taillights indicate your car's presence to the drivers approaching from behind. You have to check these lights regularly and make sure they work properly as most vehicles do not have sensors to alert drivers that either went out. If any of these lights are not working, it might be especially dangerous for you to drive at night or in inclement weather. Aside from a safety concern, if the police catch you driving with either light out you may get a ticket, which should be reason enough to make it a priority!

Brakes

A simple rule of thumb, if you hear any squeaking when you brake more than a day you should get them checked out. Sometimes brake can squeak if they've been sitting for a while (like after a long trip) or after periods of inclement weather (lots of rain, humidity or snow). It's not necessary to go in immediately if you hear a noise as the noise often times will go away after being driven for a bit. If the noise is persistent do not hesitate to take it in as that can be an immediate safety concern as well as the longer you delay putting your brakes off the more expensive it is to repair. If you hear grinding when you stop that's a telltale sign you've burned through your brake pads and are wearing down your rotors, which, depending upon the make and model of your car can be quadruple the cost of brake pads alone.

Get a Good Mechanic

You don't have to necessarily know about cars to pick a good mechanic. The best way is to get a personal reference from a family member or friend if that doesn't work look at reviews online. Does the mechanic have a good reputation? How many reviews are posted? How many complaints were made? Did the shop respond? Did the shop seem to care about the customers' concerns' and remedy the situation? Even if you have to drive further than you'd like, going to a reputable shop can save you more time (and money) in the long run.

<https://caradvise.com/vehicle-ownership-101-what-everyone-should-know/>

Car-care basics for first-time owners

Check out the owner's manual. Few people bother to read the owner's manual unless they're forced to, but this is a mistake. Owner's manuals explain in simple language all of a car's features, including some you probably didn't know you had, what specific oil or fluid to use, and what maintenance schedule to follow. If the owner's manual didn't come with the car, you can probably find one free online.

Use your common senses. Be alert for any unusual noises, smells, or fluid leaks. Likewise, be attention to changes in performance, such as diminished braking, acceleration, or steering abilities. Nipping problems in the bud can often prevent huge repair bills that result from ignoring the warning signs.

Tire pressure. No routine maintenance task is more important than keeping your tires properly inflated. Under-inflated tires wear faster, waste gas, and degrade your car's handling. Check pressure at least once a month and before any long trip. The correct inflation pressure is printed on a placard usually found inside the driver's door jamb, and it is sometimes printed on the inside of the glove-box or fuel-filler door. Keep a tire pressure gauge in the car. We prefer digital gauges with an illuminated readout.

Paint pampering. Regular car washing and waxing help preserve a car's paint from corrosive salt, bug splatter, bird droppings, and road grime. Despite what the ads may say, though, no wax job lasts more than a few weeks at best. Paste wax is not necessarily better than liquid polish, either, and premium brands don't necessarily outlast lower-priced alternatives.

Take periodic service schedules seriously. It's important to follow owner's manual recommendations for oil-change intervals and major services as having the timing belt replaced. But you don't need to have that work done more often than the book says, regardless of what a service shop may tell you.

Join a motor club. A motor club such as AAA and Better World can be a lifesaver. They supply 24-hour roadside assistance if you break down, get a flat, or need to be towed. Plus, there are often various discounts associated with membership, such as for rental cars or hotels. Your auto-insurance company may be affiliated with a motor club, as well. Call your agent for details.

Renew the wipers. Windshield wipers don't last forever. Figure six months, at best, before they start leaving streaks. If the wiper rubber disintegrates and flies off, the motion of the bare wiper arm on the windshield can indelibly scar the windshield in minutes. We have found that midlife, after a few months of use, wipers can often be renewed with a glass cleaner and paper towel.

Car documents to carry. It's a good idea to keep all your car-repair receipts in the car. That way the dated service records and, perhaps, warranty cards for new tires, battery, muffler system, and so on are handy when needed. Always keep your car's registration certificate and your insurance card in the car. But keep your car's title certificate at home, under lock and key.

Local shop versus dealership. Local mom-and-pop repair shops are generally less costly because they have lower labor rates than franchised dealerships, and often charge less for parts. Franchised dealer service departments, though, specialize in your brand and their technicians have access to specialized tools and training. In our surveys, subscribers routinely report higher satisfaction with independent shops.

Choosing a local mechanic. Ask your network of family and friends for service-shop recommendations. Shops with well-qualified mechanics often display a sign or certificate from ASE, a national certification organization. But, that doesn't ensure all workers have the same certifications or that the person wrenching on your car is certified. Garages affiliated with AAA are good bets. And wherever you habitually have repair work done, try to establish a relationship of trust and respect. Both dealerships and local shops often cut more slack to loyal customers.

Conduct a "tire drill." Some day you'll almost certainly get a flat tire. If you've never changed tire, practice installing your spare, using the jack and tools that came with the car. The owner's manual will tell you how. Ask an experienced friend to help out the first time through. An older car's wheel nuts can be stubborn customers. If the wrench supplied with your car is not up to the task, consider buying a cross-handled wheel-lug wrench or long torque wrench from an auto-parts store and keeping it in your trunk. Flat tires can often occur at inconvenient times, a little preparation can help get you on the road quicker and with less stress.

<https://www.consumerreports.org/cro/2014/01/car-care-basics-for-first-time-owners/index.htm>

III. Financial Management

a. *Session Title:* Budgeting

b. *Supplies*

Computer

Internet access

c. *Description*

1. Purpose

The purpose of this activity is to develop executive functioning and financial management skills.

Client goals

8. Client will independently participate in financial planning by calculating future expenses and savings dependent on wage using a virtual/written budget template within 1 week.
9. Client will independently prepare personal budget plan to facilitate readiness prior to transitioning out of BSCC, within 1 month.

2. Introduction

This activity will begin with a verbal outline from the facilitators explaining the session's format.

3. Warm-up

10. Facilitators will display budget template sample using Google Drive Budget Template:

Google Drive → New → Google Sheets → From a template → Monthly budget (<https://docs.google.com/spreadsheets/d/1wH0yjvpYcQIfszMH5G7MQoDayHtEhcUPqgyhNmcdJcY/edit#gid=0>). Facilitators will discuss the value of keeping budget online due to automatic calculations and ease with revisions and adjustments. Facilitators will then begin to fill out template and demonstrate use to client by inputting 'Starting Balance' in the top right hand corner and then add sample amounts into 'Expenses' in order for the clients to see automatic calculations being done by template to show amount differences and what expenses they have not accounted for. Only edit highlighted cells.

11. Facilitators will have clients locate own 'Monthly Budget' through internet access, and they will then have the choice to use either the Google Drive Budget Template previously shown or their own.

4. Activity

Clients will use monthly budget template chosen. Instructions will be applicable for, both, online and printed templates. Facilitators will have client think ahead to what they plan to make when they transition out of BSCC housing. Client will input Monthly starting balance into correct location and begin to plan out and start thinking of appropriate amounts to spend within each category (Food, Travel, Rent).

5. Application/Follow-up

6. Discussion

Facilitators will discuss the importance of saving and financial planning for future independent living. Discuss 'Budgeting Guide' with client, provided within this session. Open session to any questions the client may have.

7. Summary

Provide homework:

12. Have client schedule a time and date with Marisa for financial planning one month prior to moving out of transition homes. Marisa will work with client to plan out finances and assistance from BSCC to help client slowly transition to paying independently.

Provide external resources and handouts within this session to client. Thank client for participation and address accomplishment.

d. *External Resources*

1. Alabaster Jar Project | Marjorie, Program Coordinator (949) 302-3739

Escondido, Transportation from Escondido Transit Station available

Financial Literacy (1st & 3rd Thursdays 4:30-5:30pm)

2. San Diego Financial Literacy Center | (858) 810-7007

SDFLC Headquarters, info@sdfc.org

Helps SD County residents increase financial literacy

3. Financial Wellness Wednesdays | (858) 694-2415

San Diego County Library, Annually in month of March

Partnered with SDCCU to offer free weekly sessions covering personal finances

4. San Diego Saves | (202) 387-6121

Consumer Federation of America, Attn: America Saves

Campaign dedicated to helping individuals save money, reduce debt, and build wealth

Budgeting Guide

1. Budget every month before the month begins.

To get ahead, you need to think ahead. This is solid life advice—and a superb first budgeting tip. You need a new budget each month. And you need to set that up before the month begins.

2. Budget to zero.

Why? Telling all your money where to go means you're in charge of it—you own it instead of the other way around.

3. Track every expense.

Seriously. Every. Single. One. The impulse pack of gum. The drive-thru coffee on the way to work. The corgi-covered socks. Those things add up. Literally. \$ + \$ + \$ = \$\$\$\$. Tracking every expense is how you know where all your money's going. Then you can start telling your money to go exactly where you want.

4. Review your spending habits.

You have to get real with yourself. And you do that by reviewing your spending habits. That gum-buying routine, drive-thru coffee habit, or sock obsession could be costing you some serious money that would be way better spent on your current money goal.

5. Set a realistic budget.

Like we just said, it's okay to add some money into a line if you've been unrealistic with the planned amount. If you're trying to save on groceries, for example, and you've done all the coupon clipping, meal planning, and BOGO shopping you can—but you're still overspending each month—you probably need to up that grocery budget.

6. Make adjustments.

So, we already said you'll need to adjust when you realize you started with unrealistic expectations. You'll also need to adjust when a bill is more or less than what you planned. Moral of the story is: Don't be afraid to make adjustments. Just keep the goal of spending less than you make (overall) a key objective. That's how you succeed with your money.

7. Create a "Miscellaneous" category.

We're not elephants. We do forget. Your kid's school fundraiser. Your \$2 portion for that co-worker's birthday cake. Your anniversary. (Yeah. Don't forget that.) You might be surprised when these things pop up, but your wallet doesn't have to be. Make room in your budget for the little things that slip your mind by creating a "Miscellaneous" line with \$50 or so in it.

8. Budget for semi-annual expenses.

There are some things that really shouldn't be a surprise hit to your budget, though, even though they don't come every month. We're talking about those semi-annual expenses like car insurance, your pet's annual checkup, your anniversary (because—seriously, you should be ready for this). One perfect option is to set up a sinking fund for any and every semi-annual expense. This way you can be saving up month by month for the day that expense is due.

9. Save for big purchases a little at a time.

Another great thing about sinking funds is you can use them to save up for big purchases. Be prepared for new tires by being watchful of the treads on all the wheels. Save up for Christmas all year long since you know it's coming December 25. Pay cash for that new digital camera to take your photography hobby to the next level (or create a new side hustle).

10. Budget for fun.

We don't mean to budget for the fun of it. We mean put in a budget line for fun things. All work and no play make you a dull, angry, frustrated, back-sliding budgeter. Of course, don't go crazy. But there are ways to have fun and even reward yourself on a budget. And it's easier to stay on track when the track offers one fancy coffee a month, extra foam, hold the guilt.

11. Understand the difference between needs and wants.

Speaking of fancy coffee—we all know that's a want and not a need, right? Yes. We do. But other lines can blur. If your shoes are literally falling apart, you need new shoes. But that red vegan leather moto jacket—that's a want. We budget for both but needs get the priority.

12. Give yourself grace.

You will make mistakes. We all do. And it generally takes three months before you get the hang of this budgeting thing, so be kind to yourself—both at the start and throughout your new budgeting lifestyle.

Because that's what this budgeting stuff is—a lifestyle. And it's the best kind possible: the life doesn't control my money—I DO! daily decision to make better money decisions.

<https://www.everydollar.com/blog/budgeting-tips-every-budgeter-needs-to-know>

IV. Leisure Participation

a. *Session Title:* Leisure Exploration

b. *Supplies*

Computer

Internet Access

Writing utensil

‘Leisure in the Community’ Handout

c. *Description*

1. Purpose

The purpose of this activity is to promote personal development, social, coping, and emotion regulation, and internet navigation skills

Client goals

- Client will demonstrate an understanding of the benefits to participation in leisure activities within 1 week.
- Client will identify at least one leisure activity to initiate to promote leisure participation within 2 weeks.

2. Introduction

This activity will begin with a verbal outline from the facilitators explaining the session’s format.

3. Warm-up

- Facilitators will initially ask client what their meaning of the word ‘Leisure’ is. Once the appropriate definition of leisure is addressed (Defined on following page, ‘Leisure Information Sheet’), ask client about what they do for fun. Due to the client’s choice in this activity, they may not have leisure activities that they participate in. Facilitators will convey that it is normal to not necessarily have leisure activities at this point but describe its importance as well. Go over ‘Leisure Information Sheet’ to follow up with importance to maintain overall well-being.
- Facilitators will provide colored pencils/crayons for clients to color and fill in ‘Wellness Wheel’ according to handout’s prompts. Facilitators will also fill in personal wellness wheel to promote personable interaction while discussing areas they need to improve.

4. Activity

Facilitators will provide client with the handout 'Leisure in the Community' where the left column lists leisure activities. There is 1 empty slot under Leisure activities, challenge client to think of at least 1 activity to fill in for empty slot. The client will then fill in the middle columns as follows by using the internet to research local places that offer the activities. Samples are provided for both membership activities and free activities. Facilitators may assist once client requests for help with initiation of where/what to search or if unable to move forward with activity at any point.

5. Application/Follow-up

- Client and facilitators will sign-up and participate in one of the free leisure activities previously researched.

6. Discussion

Discuss leisure stories from the past and 2-3 of the ideas that the client researched. Open session to any questions the client may have.

7. Summary

Provide external resources and handouts within this session to client. Thank client for participation and address accomplishment.

d. *External Resources*

1. Stress Reduction | Vanessa

Schedule with BSCC, BSCC office

Engage in art therapy through painting, crafts, etc.

2. Alabaster Jar Project | Marjorie, Program Coordinator (949) 302-3739

Escondido, Transportation from Escondido Transit Station available

Creative expression through writing or art (2nd & 4th Thursdays 4:30-5:30pm)

Leisure Information Sheet

What is leisure?

According to Geoffrey Godbey, “leisure is... freedom from [the environment] to act from compelling love in ways which are personally pleasing, intuitively worthwhile and provide a basis for faith.” (Godbey, 1985).

Leisure is often defined by time and activity:

- Time: free time for enjoyment
- Activity: recreation activities. (DeGraff, D., Debra, J., and DeGraaf, K., 1999)

Leisure is often viewed as freely choosing to do activities after responsibilities are completed. These activities are enjoyable, pleasing, and relaxing that are done during time that is not meant for other jobs. (McGuire, F., Boyd, R., and Raymond, T., 1996).

What are the different types of leisure activities?

- Social: Activities done with other people
- Creative: Activities, where a person makes or creates something
- Physical: Activities that require body movement
- Cognitive: Activities that require a person to think
- Relaxation: Activities, where a person does to feel calm
- Spiritual: Activities, where a person submits to a higher power

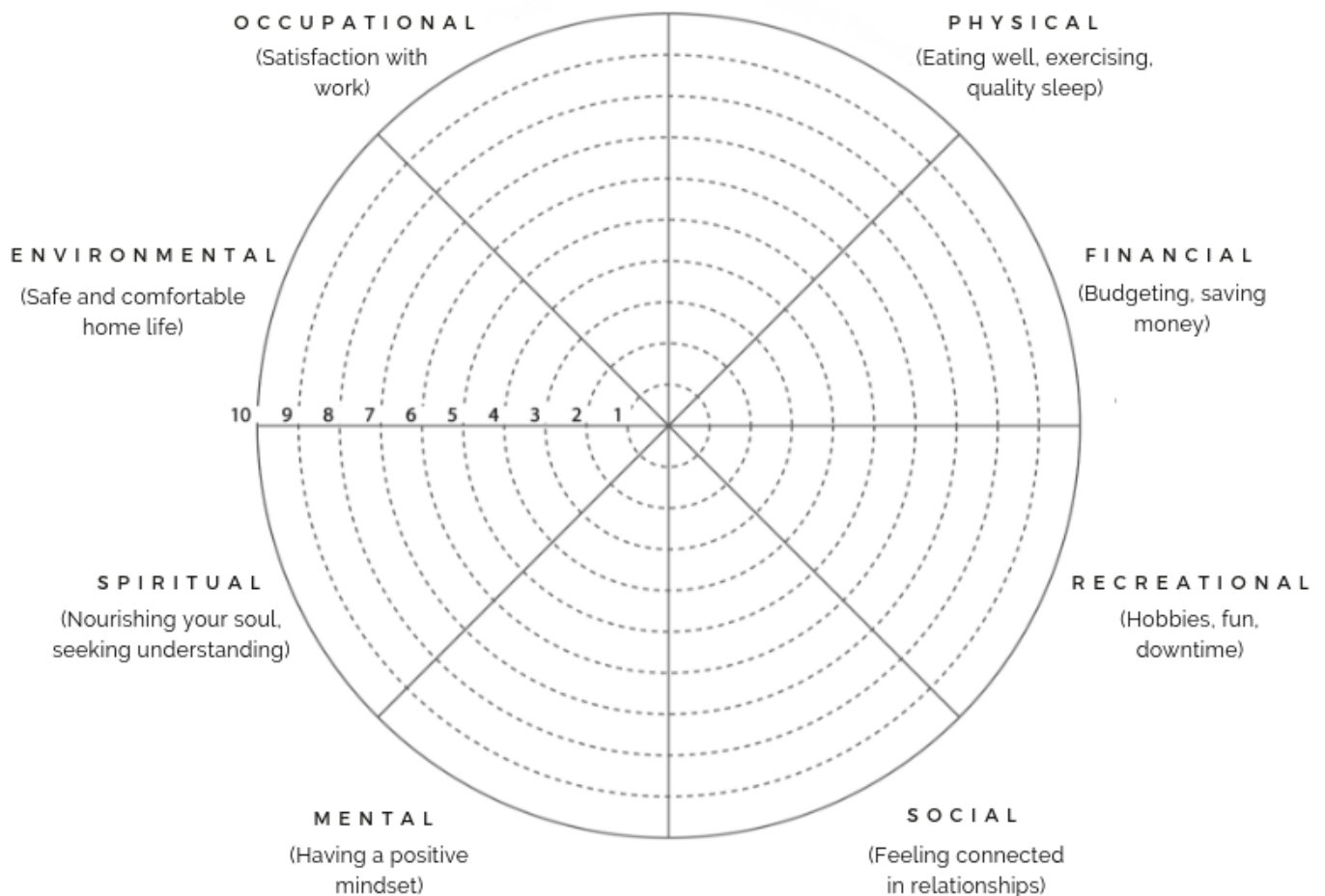
What can leisure do for a person?

Leisure offers many benefits to participants. The primary benefits include:

- Improved health
- Improved social relationships
- Improved physical fitness
- Improved mental health
- Increased life satisfaction and enjoyment
- Personal development and growth.

http://www.dannypettry.com/ebook_leisure.pdf

WELLNESS WHEEL



Within the wheel that you see above, you'll rank the different areas of your life on a scale of 1-10 based on how satisfied you feel with them. You'll be ranking the following areas of your life:

- **Physical Health** – sleep, self-care, eating habits, exercise
- **Mental Health** – the quality of your thoughts, level of positivity, attitude toward the world
- **Financial Status** – sticking to a budget, savings, tendency to overspend
- **Social Life** – interactions with family, friends, partners, colleagues, etc.
- **Occupational** – productivity levels, attitude toward work, fulfillment with position
- **Environmental/Home** – the level of comfort in your living space, cleanliness/tidiness, organization
- **Recreational** – hobbies, activities, fun, downtime
- **Spiritual/Personal Growth** – connecting with yourself or a higher power, learning new skills

<https://theblissfulmind.com/2018/09/16/hit-the-reset-button/>

Leisure in the Community

Activity	Leisure & Wellness Category	Location	Phone #	Cost	Notes
Trial SAMPLE: Boxing	Physical, Social	TITLE Boxing Club San Diego North Park 2852 University Ave	(619) 677-1341	Free initial class trial	- Flexible class times - Intro to boxing tutorial - Free weights provided
Free SAMPLE: Hiking	Physical, Social	Cowles Mountain 8301 Big Rock Rd, Santee, CA	-	Free	- 4.3 miles - Total 2-hour hike - Moderate - Dog friendly
Yoga					
Gardening					
Cooking/baking					
Art					
Zumba					
Swimming					

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